

[00167] What is claimed and desired to be secured by United States Letters Patent is:

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1. In a system including a database containing data corresponding to one or more contact groups, a contact management system for assisting one or more users to implement contact management actions regarding a contact group, wherein each of the one or more users have one of multiple roles, the contact management system comprising:

a data interface that allows contact management actions to be communicated among the one or more users, and that allows contact management actions to be communicated between the one or more users and the contact group, said data interface comprising:

a scheduler module for scheduling contact management actions with respect to the contact group, including communicating said scheduled contact management actions to the one or more users, and wherein the one or more users are allowed to implement contact management actions therefrom;

an info sheet module for providing basic data regarding the contact group and allowing the one or more users to implement contact management actions therefrom;

a data maintenance module for providing detailed data regarding the contact group and allowing the one or more users to implement contact management actions therefrom; and

a search module for allowing the one or more users to search for the contact group and allowing the one or more users to implement contact management actions therefrom.

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2. The contact management system of claim 1, wherein said scheduler module comprises one or more of a calendar and a planner.

3. The contact management system of claim 1, wherein said info sheet module comprises one or more of identifying information, history of contact management actions, campaigns, worksheets, opportunities, keywords, important dates, accounts, and sales profile information pertaining to the contact group.

4. The contact management system of claim 3, wherein said history of contact management actions comprises one or more of a hierarchical history view for displaying contact management actions based on objectives; and a list view, wherein the list view is sequenced by a characteristic identified by the one or more users.

5. The contact management system of claim 1, wherein said data maintenance module comprises one or more of identifying information, status, last contact date, last message date, channel of communication preferred by the contact group, and financial information pertaining to the contact group.

6. The contact management system of claim 5, wherein said data maintenance module comprises a view of said detailed data regarding the contact group based on one or more of individuals, mailing addresses, phone numbers, e-mail addresses, important dates, accounts, and address modules pertaining to the contact group.

7. The contact management system of claim 1, wherein said search module comprises one or more of hierarchy search tools, alphabet search tools, and status search tools.

8. The contact management system of claim 1, further comprising one or more of:

an address module for selectively identifying a preferred address for a contact group connecting it with one or more appropriate individuals in said contact group, and storing an appropriate form-of-address for the one or more appropriate individuals in the address module, said address module being suitable for use in enabling the one or more users to send a message to said preferred address;

a action button module for assisting the one or more users to automatically initiate contact management actions;

a worksheet module comprising a worksheet, said worksheet comprising data imported from the database and data fields defined by the one or more users; and

an messaging module for scheduling and sending correspondence from the one or more users to the contact group through a predetermined channel of communication, said predetermined channel of communication comprising a default channel of communication selected by the one or more users.

9. In a system including a database containing data corresponding to one or more contact groups, a method for contact management wherein one or more users implement contact management actions with respect to a contact group, the method comprising the steps for:

the one or more users communicating with the contact group through a mode of communication to achieve a predetermined purpose;

implementing contact management actions with respect to the contact group using a data interface during said communication, said data interface comprising:

a scheduler module for scheduling contact management actions with respect to the contact group, including selectively communicating said scheduled contact management actions to the one or more users, and wherein the one or more users are allowed to implement contact management actions therefrom;

an info sheet module for providing basic data regarding the contact group and allowing the one or more users to implement contact management actions therefrom;

a data maintenance module for providing detailed data regarding the contact group and allowing the one or more users to implement contact management actions therefrom; and

a search module for allowing the one or more users to search for a contact group and allowing the one or more users to implement contact management actions therefrom; and

determining appropriate responses regarding said communication with the contact group.

10. The method of claim 9, wherein said mode of communication comprises one or more of telephone, e-mail, mail, and fax.

11. The method of claim 9, wherein the step for determining appropriate responses regarding said communication with the contact group further comprises automatically initiating contact management actions using a action button module comprising the steps for:

determining an objective, said objective being determined from said communication with the contact group;

scheduling and sending one or more messages to the contact group in order to achieve said objective;

scheduling contact management actions, wherein the contact management actions are communicated to the appropriate user selected from the one or more users in order to achieve said objective, wherein the appropriate user comprises one of salesperson, a sales assistant, a service assistant, and a computer operator;

adding one or more notes that indicate the contact management actions that have already occurred in reference to said objective; and

updating the database such that the data for the contact group reflects the contact management actions that have been implemented.

12. The method of claim 11, wherein the step for automatically initiating contact management actions comprises the step for prompting the one or more users to input information regarding said communication.

13. The method of claim 11, wherein the step for automatically initiating contact management actions comprises the step for automatically completing the contact management actions.

14. The method of claim 9, further comprising one or more of the steps for:

- selectively identifying a preferred address in the contact group and sending a message to said preferred address;
- defining a worksheet, importing data from the database into said worksheet, and defining new data fields in said worksheet;
- sending correspondence from the one or more users to the contact group through a predetermined channel of communication;
- determining a form-of-address for each individual in the contact group;
- providing a context-sensitive history;
- creating one or more action buttons, each action button defining a series of contact management actions; and
- assigning contact management to some of the one or more users.

15. The method of claim 9, further comprising the step for implementing campaign management actions on the one or more contact groups, wherein the step for

implementing campaign management actions on the one or more contact groups comprises the steps for:

creating a campaign from a campaign master, including defining one or more campaign tracks according to predetermined criteria;

executing said campaign by determining on which of the one or more contact groups the campaign will be implemented and by implementing a series of campaign management actions;

evaluating the one or more contact groups during said execution of said campaign, including determining whether the one or more contact groups qualifies under said predetermined criteria of one or more campaign tracks; and

automatically initiating a response based on said evaluation.

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16. In a system, including a database that maintains data for one or more contact groups, wherein one or more users communicate with and implement contact management actions regarding a contact group, and wherein such communication requires an appropriate response, a method for initiating the appropriate response comprising the steps for:

determining an objective, said objective being determined from the communication with the contact group;

sending one or more messages to the contact group in order to achieve said objective;

scheduling contact management actions, wherein the contact management actions are communicated to the appropriate user selected from the one or more users in order to achieve said objective, wherein the appropriate user is one of a salesperson, a sales assistant, a service assistant, and a computer operator;

adding one or more notes that indicate the contact management actions that have already occurred in reference to said objective; and

updating the database such that the data for the contact group reflects the contact management actions that have been implemented.

17. The system of claim 16, further comprising the step for assigning a new keyword from a previous keyword such that said new keyword reflects the contact management actions that have been implemented.

18. The method of claim 16, further comprising the step for prompting the one or more users to input information regarding the communication.

19. The method of claim 16, further comprising the step for automatically completing the appropriate response to the communication.

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20. In a system including a database containing data corresponding to one or more contact groups, a management system suitable for use for implementing management actions, wherein the management actions include contact management actions and campaign management actions, the management system comprising:

a data interface for allowing one or more users to implement management actions therefrom, said data interface comprising a scheduler module for scheduling management actions with respect to a contact group; an info sheet module for providing basic data regarding the contact group; a data maintenance module for providing detailed data regarding the contact group; a search module for allowing the one or more users to search for the contact group; and one or more of:

an action button module for initiating management actions that are completed by the one or more users;

a worksheet module comprising a worksheet, said worksheet comprising data imported from the database, and data fields defined by the one or more user;

a messaging module comprising a predetermined channel of communication; and

an address module comprising a preferred address corresponding to one or more individuals in the contact group.

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21. The management system of claim 20, wherein the management actions include one or more of setting objectives, sending messages, making notes, scheduling contact management actions, updating the database, and resetting keywords.

22. The management system of claim 20, wherein said action button module requires input from the one or more users.

23. The management system of claim 20, wherein said action button module ensures that the management actions are performed.

24. The management system of claim 20, wherein said predetermined channel of communication defines a default channel of communication.

25. The management system of claim 20, wherein said preferred address comprises one or more of a mailing address, a telephone number, a fax number, and an e-mail address.

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26. In a system including a database containing data corresponding to a group of contact groups, a method for campaign management for allowing one or more users to implement campaign management actions regarding a group of contact groups, the method comprising the steps for:

creating a campaign, including defining one or more campaign tracks according to predetermined criteria;

executing the campaign, wherein said execution requires implementing a series of campaign management actions;

evaluating a group of contact groups during said execution of said campaign, including determining whether a group of contact groups qualifies under said predetermined criteria of said one or more campaign tracks; and

automatically initiating a response based on said evaluation.

27. The method of claim 26, wherein the step for automatically initiating a response further comprises the step for sorting the group of contact groups into said one or more campaign tracks.

28. The method of claim 26, wherein the step for executing the campaign further comprises selecting a campaign master.

29. The method of claim 26, wherein the step for executing the campaign further comprises the step for defining a campaign instance.

30. The method of claim 26, wherein the step for executing the campaign further comprises the step for viewing said campaign according to campaign management actions.

31. The method of claim 26, wherein the step for executing the campaign further comprises the step for viewing said campaign according to a group of contact groups qualifying under said predetermined criteria of said one or more campaign tracks.

32. The method of claim 26, wherein the step for executing the campaign further comprises the step for implementing contact management actions using a data interface and facilitating communication between the one or more users and the group of contact groups, said data interface comprising:

a scheduler module for scheduling contact management actions with respect to the group of contact groups, including communicating said scheduled contact management actions to the appropriate one or more users;

an info sheet module for providing basic data regarding the group of contact groups;

a data maintenance module for providing detailed data regarding the group of contact groups; and

a search module for allowing the one or more users to search for the group of contact groups.

33. The method of claim 26, further comprising the step for automatically initiating an appropriate response to a communication between one or more users and a group of contact groups comprising the steps for:

determining an objective, said objective being determined from said communication with the group of contact groups;

sending one or more messages to the group of contact groups in order to achieve said objective;

scheduling contact management actions, wherein said contact management actions are communicated to the appropriate user selected from the one or more users in order to achieve said objective, wherein the appropriate user is one of a salesperson, a sales assistant, a service assistant, and a computer operator;

adding one or more notes that indicate said contact management actions that have already occurred in reference to said objective; and

updating the database such that the data for the group of contact groups reflects said communication.

34. The method of claim 26, further comprising one or more of the steps for:

selectively identifying a preferred address for the group of contact groups and sending a message to said preferred address;

defining a worksheet, importing data from the database into said worksheet, and defining new data fields in said worksheet; and

sending correspondence from one or more users to the group of contact groups through a predetermined channel of communication.

35. In a system including a database containing data corresponding to a collection of contact groups, a campaign management system for assisting one or more users to implement campaign management actions regarding the collection of contact groups, the campaign management system comprising:

a campaign management data interface for facilitating communication between the one or more users, and for facilitating communication between the one or more users and the collection of contact groups, said campaign management data interface comprising:

a campaign editor module for defining a campaign therefrom and allowing the one or more users to implement campaign management actions therefrom regarding the collection of contact groups;

a campaign wizard module for scheduling said campaign therefrom and allowing the one or more users to implement campaign management actions therefrom regarding the collection of contact groups; and

a campaign manager module for executing said campaign therefrom and allowing the one or more users to implement campaign management actions therefrom regarding the collection of contact groups.

36. The campaign management system of claim 35, wherein said campaign comprises one or more of campaign tracks, campaign management actions, campaign messages, campaign scripts, and campaign checklists.



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37. The campaign management system of claim 35, wherein said campaign tracks further comprises one or more categories defined by predetermined criteria.

38. The campaign management system of claim 35, wherein said campaign editor module further comprises one or more of a campaign master, a campaign version, and a campaign overview seminar.

39. The campaign management system of claim 35, wherein said campaign wizard module further comprises a campaign instance.

40. The campaign management system of claim 35, wherein said campaign manager module further comprises a campaign management action view.

41. The campaign management system of claim 35, wherein said campaign manager module further comprises a contact group view.

42. The campaign management system of claim 35, further comprising a contact management data interface for allowing the one or more users to implement contact management actions regarding the collection of contact groups therefrom, said contact management data interface comprising:

a scheduler module for scheduling contact management actions with respect to the collection of contact groups, including communicating said scheduled contact management actions to the one or more users;

an info sheet module for providing basic data regarding the collection of contact groups;

a data maintenance module for providing detailed data regarding the collection of contact groups; and

a search module for allowing the one or more users to search for the collection of contact groups.

43. The campaign management system of claim 35, further comprising one or more of:

an address module for selectively identifying a preferred address for each contact group in the group of contact groups, said address module being suitable for use in enabling the one or more users to send a message to said preferred address;

an action button module for assisting the one or more users to automatically initiate management actions on one or more of the collection of contact groups;

a worksheet module comprising a worksheet, said worksheet comprising data imported from said database and data fields defined by the one or more users; and

a messaging module for sending correspondence from the one or more users to the group of contact groups through a predetermined channel of communication.